

Asset Summary

Asset Summary is used to track which assets must go through probate and which can be distributed outside of probate. Use information from the indicated forms to compile this information. If the forms do not already contain information, use them as a guide.

An asset must go through probate if it is not owned by a Trust and no beneficiary is designated. Place an 'X' in the **PROBATE** column when this is the case, indicating that this asset must go through probate.

The following information may be found in [Asset Information](#).

Certificates of Deposit, Treasury Bills & Savings Bonds

Financial Inst/Broker & Phone	Owner(s)	Beneficiary (if applicable)	PROBATE? ('X' if Yes)

Money Market Funds

Financial Inst/Broker & Phone	Owner(s)	Beneficiary (if applicable)	PROBATE? ('X' if Yes)

Mutual Funds

Financial Inst/Broker & Phone	Owner(s)	Beneficiary (if applicable)	PROBATE? ('X' if Yes)

Stocks

Financial Inst/Broker & Phone	Owner(s)	Beneficiary (if applicable)	PROBATE? ('X' if Yes)

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Bonds

Financial Inst/Broker & Phone	Owner(s)	Beneficiary (if applicable)	PROBATE? ('X' if Yes)

Limited Partnerships, Investment Clubs & Other

Names and Phone	Owner(s)	Beneficiary (if applicable)	PROBATE? ('X' if Yes)

The following information may be found in [Personal Property Inventory](#).

Automobile Titles, Leases & Registrations

Description	Title holder	Beneficiary (if applicable)	PROBATE? ('X' if Yes)

The following information may be found in [Insurance Policies](#).

Life

Company/Agent/Phone	Policy #	Beneficiary	PROBATE? ('X' if Yes)

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Other

Company/Agent/Phone	Policy #	Beneficiary	PROBATE? (‘X’ if Yes)

The following information may be found in [Real Estate Records](#).

Property Description (Estate, Time Share, etc.)

Legal Description	Address	Residence/Vacation/Investment

Document

Location

Deed	
Insurance Policy	
Property Purchase Records	
Property Tax Records	
Home Owner’s Association Documents	
Home Owner’s Warranties	

Mortgage Holder

Name	
Street Address	
City, State, Zip	
Loan Number	
Phone	
Fax	
Email	